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Foreign Crops and MARKETS

VOLUME 57 NUMBER 7

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TOBACCO

World 1948-49 Tobacco Harvest Forecast at Near 1947-48 Production 113

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UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

The 1948-49 cotton crop in Pakistan is estimated by private sources at 920,000 to 1,000,000 bales (of 500 pounds gross) which is slightly less than the 1,000,000 bales (third estimate) produced a year ago. From the 1948-49 crop India will be allotted 417,000 bales, Japan 250,000, and the U.S.S.R. 167,000, and about 65,000 will be consumed by the 13 mills in Pakistan. Only about 65,000 bales of the 1948-49 crop are Asiatic-type cotton, the remainder being derived from American varieties. The 1947-48 acreage, estimated at 3,147,000 acres, is about 200,000 acres less than that for 1946-47. A 10 percent decrease is forecast for 1948-49.

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The 1948-49 cotton crop in India is privately forecast at 2,665,000 bales (of 500 pounds gross) compared with 2,335,000 a year ago. Imports from Pakistan are expected to increase from about 233,000 bales in 1947-48 (September-August) to 417,000 (allocated) in the coming year. Mill consumption is expected to rise from 2,875,000 bales (Indian and Pakistan cotton only) in 1947-48 to about 3,000,000 in 1948-49. Exports, amounting to about 833,000 bales in 1947-48 are not expected to exceed 250,000 in 1948-49. Stock figures calculated from the foregoing estimates indicate a probable reduction from 2,750,000 bales (mill and trade stocks) on September 1, 1947, to 1,600,000 on September 1, 1948, and a further reduction to 1,565,000 next year.

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A large cotton mill in Italy accounting for about 7.5 percent of the country's total cotton spinning capacity was recently sold to Italy's largest rayon producing firm. The plant eventually is expected to be diverted to the spinning of rayon staple fiber.

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The Central Bank of Argentina has established an import quota of 3,000 metric tons for rayon yarn from Italy and other countries (including France, Belgium, United Kingdom, Spain, and the Netherlands) with which Argentina has compensation agreements.

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The Government of India announced about July 27 that licenses for importation of Brazilian cotton will be issued freely as the result of an agreement concluded by Brazil and the United Kingdom classifying Brazil as a soft currency country.

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Exports of cotton from Mexico are temporarily prohibited pending final estimate of production. Present indications are that the 1948 crop may not reach the recent estimate of 580,000 bales (of 500 pounds gross) thus reducing the export quota of 234,000 based on that figure.

WORLD 1948-49 TOBACCO HARVEST FORECAST AT NEAR 1947-48 PRODUCTION

The world's harvest of leaf tobacco during the 12 months July 1948 through June 1949 is forecast at 7,280 million pounds, or less than 1 percent below a revised 1947-48 production of 7,341 million pounds. The 1948-49 forecast is about 3 percent above a revised 1946-47 world crop and 10 percent above the prewar average, 1935-39.

The forecast is based on preliminary estimates of production reported for most of the principal north temperate zone producing countries and information indicating probable plantings for later harvest in other areas. Consequently, it is subject to significant change through the spring of 1949, but in view of the indicated decrease in production in the United States, it appears that regardless of any developments the output in countries which supply most of the leaf which will enter world trade will be below 1947-48.

The decrease in production from 1947 in the United States of about 330 million pounds is partly offset by reported higher productions in certain European countries, principally Bulgaria, Italy, and Poland, and by anticipated increases in productions in China and India. It is expected that 1948-49 crops in South American and South African countries will each total about the same as the relatively high productions in 1947-48, and that harvests in Australia and New Zealand will total somewhat higher.

As a result of a decreased production in the United States, the 1948-49 world production of flue-cured tobacco, the principal type entering world trade, will be below the large 1947-48 output. It is anticipated, however, that a substantial part of the decrease in 1948 production in the United States will be offset by a larger 1948 crop in China, and by larger harvests in the spring of 1949 in South African producing countries, India, and possibly some of the Latin American producing countries. In the case of Oriental or Turkish type tobacco, another important type entering world trade, it is anticipated that the 1948 harvest will total slightly more than the large 1947 output. Some decrease in production from 1947 is indicated for Turkey and Greece, but current reports indicate that decreases in these countries will be more than offset by increases in Bulgaria, the U.S.S.R., and Yugoslavia.

The 1948-49 world production of light air-cured types, which are grown to some extent in most tobacco producing countries, is expected to exceed the 1947-48 output. The production of dark types, other than strictly cigar leaf, may about equal that of 1947-48, and production of cigar types, as a result of an anticipated increase in the Netherlands East Indies, may be above the 1947-48 output, but still far below the prewar level.

North America: Canada's 1948 tobacco crop is forecast at 113 million pounds, as compared with 116 million in 1947. The decrease is principally the result of an acreage reduction. The yield per acre is forecast substantially above the 1947 yield. The 1948 crop is materially smaller than the large 1946 crop of 141 million pounds, but is well above the 1935-39 average of about 77 million pounds.

(Text Continued on Page 116; Table Follows)

TOBACCO: Acreage, yield per acre, and production in specified countries, average 1935-39, annual 1946 and 1947, forecast 1948. 1/

Continent and country	Acreage Harvested			Yield per Acre 2/			Production			Forecast 1948 3/		
	Average 1935-39	1946 3/	1947 3/	Average 1935-39	1946 3/	1947 3/	Average 1935-39	1946 3/	1947 3/	Acreage	Yield per acre	Production
	1,000 acres	1,000 acres	1,000 acres	Pounds	Pounds	Pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 acres	Pounds	1,000 pounds
NORTH AMERICA:												
Canada	69	110	125	1,103	1,281	928	76,556	141,384	116,084	105	1,076	113,000
Mexico	51	-	-	840	-	-	42,426	44,533	50,706	-	-	-
United States	1,647	1,960	1,845	837	1,180	1,142	1,460,054	2,312,080	2,107,763	1,536	1,158	1,777,783
Cuba	107	140	112	474	559	540	50,833	78,210	60,858	-	-	-
Dominican Republic	-	37	38	-	978	1,160	4/ 13,660	32,518	44,092	-	-	-
Puerto Rico	44	31	28	673	750	875	29,393	23,500	24,500	-	-	-
Estimated total 5/	1,960	2,330	2,210	-	-	-	1,710,000	2,690,000	2,470,000	1,930	-	2,096,000
EUROPE:												
Albania	5	-	-	826	-	-	4,082	-	-	-	-	-
Belgium	6	12	6	2,500	2,073	2,079	16,431	24,075	13,391	-	-	15,400
Bulgaria 6/	94	154	114	809	685	921	75,871	105,394	105,821	-	-	150,000
Czechoslovakia 6/	7/ 24	14	15	7/ 1,288	1,324	915	7/ 31,143	18,913	14,184	17	1,160	20,062
France 6/	44	60	72	1.676	1,477	1,598	72,995	88,565	115,062	67	1,603	106,923
Germany	33	-	-	2,254	-	-	74,355	-	-	-	-	-
Greece 6/	226	172	200	589	362	516	132,819	62,124	103,322	195	500	97,500
Hungary 6/	37	37	47	1,238	874	792	45,872	32,408	37,528	47	1,021	48,016
Italy 6/	81	106	143	1,173	900	999	95,511	95,499	143,299	156	1,100	171,600
Poland	17	-	30	1,664	-	892	28,566	-	26,455	31	1,430	44,864
Rumania 6/	44	63	-	647	277	-	28,697	17,317	38,140	70	600	42,000
Spain	-	24	30	-	1,356	1,027	17,322	32,448	30,452	37	884	33,069
Sweden	1	1	1	1,735	1,473	1,342	1,061	1,118	908	-	-	1,500
Switzerland	1	4	3	1,571	1,774	1,856	2,276	6,460	5,512	-	-	5,550
Yugoslavia	39	-	-	969	-	-	37,410	-	-	-	-	-
Estimated total 5/	680	740	800	-	-	-	675,000	555,000	720,000	916	-	828,000
U.S.S.R.	7/ 490	-	-	7/ 1,129	-	-	525,000	-	-	-	-	-
ASIA:												
Cyprus	2	-	-	363	-	-	225	-	-	-	-	-
Iran	32	38	38	1,096	980	998	34,542	36,947	37,478	-	-	-
Iraq	7/ 11	-	-	7/ 752	-	-	7/ 8,057	-	-	-	-	-
Palestine	7	-	-	401	-	-	2,760	1,884	2,240	-	-	-
Syria and Lebanon	7/ 13	26	20	7/ 699	654	667	7/ 8,825	16,914	13,285	-	-	-
Turkey	194	305	320	661	709	688	128,505	215,945	220,460	270	670	180,900
Burma	108	-	-	990	-	-	107,072	-	-	-	-	-
China 8/	1,228	1,383	1,476	1,021	986	969	1,254,539	1,363,006	1,429,806	-	-	1,475,000
French Indochina	7/ 44	-	-	7/ 728	-	-	7/ 32,004	-	-	-	-	-

Pakistan	7/ 355	-	-	913	-	-	7/ 324,053	-	-	-	-	-
India	7/ 917	-	-	831	-	-	761,600	-	-	-	-	-
Japan	92	57	102	1,621	1,146	1,288	148,680	65,133	131,811	-	-	-
Formosa	4	-	-	1,458	-	-	5,961	-	6,800	-	-	13,000
Korea	46	40	37	1,252	855	1,077	57,304	33,936	39,459	-	-	-
Java and Madura:												
Estate	7/ 69	-	-	976	-	-	7/ 67,672	-	-	-	-	-
Native	7/ 349	-	-	402	-	-	7/ 140,298	-	-	-	-	-
Sumatra Estate	7/ 31	-	3	988	-	889	7/ 30,715	-	2,646	-	-	-
Philippine Islands	176	51	93	427	420	333	74,811	21,296	30,864	-	-	-
Siam	7/ 25	-	-	7/ 688	-	-	7/ 17,179	-	-	-	-	-
Estimated total 5/	3,750	3,550	3,670	-	-	-	3,250,000	3,039,000	3,150,000	3,730	-	3,257,000
SOUTH AMERICA:												
Argentina	34	74	-	928	797	-	31,558	59,216	-	-	-	-
Brazil	237	371	-	851	604	-	202,703	224,364	265,000	-	-	-
Chile	9	6	8	1,846	1,988	1,654	16,618	11,680	12,701	-	-	-
Colombia	7/ 37	-	-	7/ 803	-	-	29,706	41,006	-	-	-	-
Paraguay	22	22	-	801	1,274	-	17,792	27,575	24,251	-	-	-
Uruguay	2	2	-	825	1,081	-	1,254	1,966	-	-	-	-
Estimated total 5/	355	530	480	-	-	-	305,000	371,000	400,000	475	-	400,000
AFRICA:												
Algeria	56	-	53	691	-	597	38,667	37,478	31,526	-	-	37,125
Nyasaland	57	-	-	286	-	-	16,311	9/ 29,000	22,850	-	-	-
Madagascar	7/ 19	5	-	7/ 764	534	-	7/ 14,164	2,641	-	-	-	-
Northern Rhodesia	7/ 4	10	14	7/ 426	457	369	7/ 1,635	4,500	5,150	-	-	-
Southern Rhodesia	51	104	124	507	612	640	26,061	63,639	79,130	-	-	-
Tunisia	1	-	-	1,196	-	-	1,202	-	-	-	-	-
Union of South Africa	7/ 41	-	-	7/ 500	-	-	7/ 20,476	39,411	50,521	-	-	-
Estimated total 5/	245	332	385	-	-	-	125,000	185,000	203,000	410	-	209,000
OCEANIA:												
Australia	10	4	4	532	891	528	5,276	4,002	2,192	-	-	-
New Zealand	2	4	4	787	1,227	1,184	1,457	4,073	5,110	-	-	-
Estimated total 5/	12	8	9	-	-	-	6,733	8,075	7,302	11	-	9,000
Estimated world total 5/	7,492	7,934	8,092	-	-	-	6,597,000	7,064,000	7,341,000	8,071	-	7,280,000

1/ Year beginning July 1. For North temperate zones countries, harvests July through October of the year shown; for all other countries, harvests November-December of the year shown and January through June of the following year. In similar tables prepared in recent years data for Northern Hemisphere countries below the Temperate Zone have been harvests of the year shown rather than harvests following the July-October harvest in North temperate zone countries. 2/ Some yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand. 3/ Preliminary. 4/ Exports. Production data not available. 5/ Totals include approximations for countries not listed and for countries listed where data are not available. 6/ Data for 1935-39 not comparable with subsequent years. Data for 1946, 1947, and 1948 are for postwar areas. 7/ Less than a 5-year average. 8/ Free China for 1935-39; all China except Manchuria for 1946, 1947, and 1948. 9/ Approximated.

Office of Foreign Agricultural Relations. Official estimates of foreign countries, reports from U.S. Foreign Service Officers, results of Office research, and other information.

The United States crop was forecast as of August 1 at 1,778 million pounds, compared with the 1947 harvest of 2,108 million pounds, and the prewar average, 1935-39, production of 1,460 million pounds. Of the 330 million-pound decrease in production from 1947, 312 million pounds were accounted for by the decrease in production of flue-cured leaf.

Factors which may affect planting of tobacco for harvest in the spring of 1949 in Puerto Rico, Cuba, Mexico, the Dominican Republic, and other Latin countries of North America indicate some decrease in area, which might mean smaller harvests than in the spring of 1948. Current estimates of 1947-48 crops in these countries approximately equal the total 1946-47 production. Increases in output are reported for Mexico, the Dominican Republic, and Puerto Rico, but the 1947-48 Cuban crop is reported about 17 million pounds below the 1946-47 crop.

For all of North America, the 1948-49 production of tobacco is forecast at 2,096 million pounds, as compared with a revised estimate of 2,470 million pounds in 1947-48, and the average prewar production, 1935-39, of 1,710 million pounds.

Europe: Recent estimates of the 1947 production of tobacco in Europe, excluding the U.S.S.R., totaled substantially higher than those previously received for that year, and reports to date indicate even larger harvests in 1948. Sharp increases over 1947 are reported for Bulgaria, Italy, Hungary, Poland, and Czechoslovakia. Increases in output are also indicated for Belgium, Rumania, Spain, Sweden, and Switzerland. Some decrease in production is reported for France and Greece, and information for Germany indicates a 1948 crop about equal the 1947 output. The total 1948 production for Europe is forecast at 828 million pounds, as compared with a revised 1947 production of 720 million pounds and the prewar, 1935-39, average of 675 million pounds.

U.S.S.R.: Authentic information on tobacco production since the war in the U.S.S.R. is not available, but unconfirmed reports indicate an output in 1948 about 8 percent below the prewar average of about 525 million pounds. It is evident that the 1948 crop is substantially above the relatively low production in 1947.

Asia: The 1948 production of tobacco in Turkey is forecast at about 18 percent below the record 1947 harvest of 220 million pounds. For other Asia Minor countries including Iran, Iraq, Palestine, and Syria and Lebanon which produce tobacco somewhat comparable in type to Turkish leaf, 1948 harvests are generally expected to approximately equal 1947 productions. For the Far Eastern countries, 1948-49 production is expected to exceed the 1947-48 output. Higher productions, including substantial increases in flue-cured tobacco, are indicated for China and India. Production in 1948 in Japan, Korea, and Formosa is expected to total somewhat above the 1947 output. A higher crop in the spring of 1949 is anticipated in the Philippines and production in the Netherlands East Indies, though still far below the prewar level, is expected to materially exceed the low 1947-48 harvests.

For all of Asia, 1948-49 harvests are forecast at 3,257 million pounds, as compared to 3,150 million in 1947-48 and the prewar, 1935-39, average of 3,250 million.

(Continued on Page 133)

WORLD HAZELNUT FORECAST LARGER THAN LAST SEASON 1/

The 1948 preliminary forecast of hazelnut production in Italy, Spain, Turkey and the United States, the leading commercial producing countries, is 127,680 short tons, unshelled basis, compared with 112,200 tons (revised) in 1947 and 164,450 tons in 1946.

The forecast exceeds the 5-year (1942-46) average of 113,502 tons by 12 percent and the 10-year (1937-46) average of 105,737 tons by 21 percent. The final outturn checks on the 1947 crop indicate that the harvest in Spain was a little less than the early season estimate. The United States harvest turned out to be slightly larger than earlier estimates indicated.

FILBERTS, UNSHELLED: Estimated production in specified countries
1948 with comparisons
(Foreign production rounded to nearest 100 short tons)

Year	Italy	Spain	Turkey	Mediterranean Basin Total	United States Unshelled	World total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Average						
1942-1946	23,900	22,300	61,000	107,200	6,302	113,502
1937-1946	21,500	23,900	55,400	100,800	4,937	105,737
Annual						
1945	15,700	18,000	33,000	66,700	5,300	72,000
1946	47,800	18,200	90,000	156,000	8,450	164,450
1947a/	9,900	b/33,000	60,500	b/103,400	b/ 8,800	b/ 112,200
1948a/	28,500	24,000	68,700	121,200	6,480	127,680

a/ Preliminary. b/ Revised.

Office of Foreign Agricultural Relations.

Growing conditions in Spain and Turkey to-date have been generally satisfactory. In Italy, growing conditions have been spotted due to unseasonably warm weather early in the season. In the United States, conditions have been unsatisfactory and development is reported to be later than usual.

Stocks of hazelnuts remaining from the 1947 harvest in the Mediterranean Basin countries as the 1947-48 season closes are estimated at about 30,000 tons compared with 13,400 tons a year earlier. Spain has the largest carry-over, followed by Turkey. A small amount of the present carry-over may be moved in Spain before the new-crop nuts appear on the market later this month. In Turkey, even though a large tonnage remains, and the market is confused, some trade members believe that the present stocks may be disposed of before new-crop nuts arrive late this month.

A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

(Text continued on Page 119; table follows)

UNITED STATES: Imports, for consumption, of shelled and unshelled hazelnuts from specified countries, 1946-47, with comparisons

Year a/	Italy	Spain	Turkey	Other countries	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
Shelled					
Average:					
1942-46	62	352	2,437	37	2,888
1937-46	93	201	1,492	36	1,822
Annual:					
1942-43	0	0	27	0	27
1943-44	0	559	17	0	576
1944-45	0	1,191	2,989	0	4,180
1945-46	178	6	4,231	180	4,595
1946-47	133	1	4,921	5	5,060
1947-48 b/	16	0	1,861	11	1,888
Unshelled					
Average:					
1942-46	392	62	2	0	456
1937-46	318	32	1	1	352
Annual:					
1942-43	0	0	0	0	0
1943-44	0	6	0	0	6
1944-45	0	16	0	0	16
1945-46	361	220	8	0	589
1946-47	1,600	69	0	0	1,669
1947-48 b/	2	0	0	0	2

a/ Crop year basis, September-August.
b/ Ten months, September 1947 - May 1948.

Compiled from official records of the Bureau of the Census.

The 1947-48 export season was one of the poorest in the postwar period from a tonnage point of view. Italy had the smallest export, estimated at 3,100 short tons. Spain, it is estimated, exported about 9,700 tons, unshelled basis, while Turkey exported over 40,000 short tons, unshelled basis. Switzerland was practically out of the Italian and Turkish market due to a very favorable compensation deal made with Spain. The Swiss are reported to have re-sold some tonnages acquired by this means to other countries at very attractive prices. The general lack of foreign exchange in most foreign countries curtailed purchases in Italy and Turkey. Spanish exporters were hampered by high domestic prices but were able to transact some business on compensation and combined account deals.

The 1948-49 export season about to start is faced with many of the same restrictive influences of the season now closing. There appears little likelihood of hazelnuts being utilized for oil in Italy and Spain as was the case two years ago, as olive oil supplies are adequate and good crops of olives are in sight. In Spain, the higher prices will keep foreign buyers out of the market unless compensation or combined account deals are made. A revaluation of the peseta could bring Spanish prices in line with those of other countries and result in a fairly large export movement.

There appears to be a general feeling in these countries that the European Recovery Program will in some way aid in recovering part of the German market. In prewar years, Germany was the largest importer of hazelnuts, though not the largest per capita consumer. The loss of the German market has been one of the principal reasons why the producing countries have had postwar difficulty in disposing of their crops.

The 1948-49 marketing policy of the Turkish Government has not been announced. The matter of minimum export prices versus completely free exports seems to be the chief factor involved. The confusion and rapid drop of prices when minimum export prices were removed this year has brought a demand for restoration of some control on export prices. The policy which will be adopted in Turkey will have widespread repercussions in the world's hazelnut trade, since that country produces an average of 52 percent of the world's total.

1/ Prepared by W. R. Schreiber, International Commodity Specialist, Office of Foreign Agricultural Relations, U. S. Department of Agriculture, in Washington, D. C. following his recent return from the Mediterranean Area.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

ECUADOR REDUCES RICE CROP [1]

The total Ecuadoran rice harvest of 1948 is estimated at 6,200,000 bushels (181 million pounds milled), or 31 percent less than the harvest of 8,945,000 bushels (262 million pounds) in the year before, according to a report received from the American Vice-Consul at Guayaquil.

Unable to sell stocks on hand at satisfactory prices, farmers reduced substantially plantings of the second crop to be harvested in October. The first harvest, now nearly ended, was decreased as a result of smaller acreage and also by adverse weather during the growing season. Relatively large carry-over stocks on January 1 resulted in heavier exports during the first half of 1948 than in the corresponding period of the year before.

ECUADOR: Rice exports by country, January-June 1948, with comparisons

Country of destination	Average 1937-1941	1945	1946	1947 a/	January - June a/ 1947	January - June a/ 1948
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Cuba...........	2	55	46	12	0	24
Peru...........	13	0	0	0	0	5
Venezuela......	6	4	17	49	17	b/
Colombia.......	4	b/	2	13	2	2
Panama.........	2	b/	5	4	0	1
Jamaica........	0	0	16	7	b/	0
Philippines....	0	0	20	0	0	0
India..........	0	0	0	38	0	0
Others.........	4	6	c/ 24	14	3	2
Total	31	65	130	137	22	34

a/ Preliminary. b/ Less than 500,000 pounds. c/ Includes 6 million pounds to Mexico, and 5 million to Greece.
Compiled from official sources.

U. S. EXPORTS LESS RICE IN JUNE

June exports of United States rice equalled 19 million pounds, compared with 140 million pounds the month before, and with 52 million pounds in June a year earlier. Record deliveries during the August-June period of the current marketing year, however, were 9 percent more than the previous largest exports of the same months in the year before. Of the June exports, 89 percent was shipped to Cuba.

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[1] A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

UNITED STATES: Rice exports to specified countries, June 1948, with comparisons a/

Continent or country	August-July		August-June		June	
	1937-38 to 1941-42	1946-47	1946-47	1947-48 b/	1947 b/	1948 b/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Europe	43	c/	c/	21	c/	c/
Cuba	275	465	444	525	48	17
Canada	19	24	24	54	1	c/
Br. West Indies	c/	2	2	11	c/	c/
Philippines	c/	254	254	c/	c/	0
China	d/	67	67	203	0	1
Korea	d/	0	0	49	0	0
Other countries	21	22	20	25	3	1
Total	358	834	811	888	52	19

a/ Includes milled rice, brown, broken, screenings and rough rice converted to milled at 65 percent. b/ Preliminary. c/ Less than 500,000 pounds.
d/ If any, included in other countries.
Compiled from official records, Bureau of the Census.

(Continued on Page 129)

FRUITS, VEGETABLES AND NUTS

FIRST ESTIMATE OF CANADIAN FRUIT

Apple production in Canada for the 1948 season is estimated, according to the Dominion Bureau of Statistics, at 14,945,000 bushels, as compared with 14,931,000 in the preceding season and with 14,560,000 during the prewar (1935-39) average.

Pears, forecast at 753,000 bushels are 22 percent below the record crop in 1947 of 965,000 bushels, but 32 percent higher than the prewar average of 569,000 bushels. Production of plums and prunes, indicated to be 619,000 bushels, is 20 percent below the 1947 crop of 774,000 bushels and 24 percent below the record crop in 1946 of 811,000 bushels.

Peach production, estimated at 1,932,000 bushels, is 16 percent higher than the 1947 crop of 1,659,000 and 89 per cent more than the 5-year average of 1,023,000. Apricots, grown only in British Colombia, are estimated at 184,000 bushels, 16 percent higher than the previous year's crop of 159,000. The cherry crop, estimated at 312,000 bushels, is about equal to last year's production.

FRUIT: Production in Canada, 1947 and 1948

Kind	1947	1948
	1,000 bushels	1,000 bushels
Apples	14,931	14,945
Pears	965	753
Plums, prunes	774	619
Peaches	1,659	1,932
Apricots	159	184
Cherries	311	312
	1,000 quarts	1,000 quarts
Strawberries	25,559	26,967
Raspberries	18,738	18,035
	1,000 pounds	1,000 pounds
Loganberries	1,728	2,091
Grapes	74,249	74,879

CITRUS PRODUCTION HIGHER IN ALGERIA

Production of oranges including tangerines and clementines for the 1947-48 season in Algeria is estimated at 3,736,000 boxes, according to a report by Howard Brandon, American Vice-Consul at Algiers.

The 1947-48 production of 3,736,000 boxes is 22 percent higher than the previous year's output of 3,055,000 but 13 percent below the record crop of 4,298,000 boxes during 1945-46. Production of tangerines for 1948 is indicated to be 1,009,000 boxes and clementines 358,000 boxes, making a total of 1,367,000 boxes. The increased output is due to improved technical methods, better supply of fertilizer in 1947 and the fact that many young trees have come into production. Exports of oranges (including tangerines and clementines) from the 1947-48 crop amounted to 2,886,000 boxes, of which 98 percent went to France.

PRODUCTION OF CHERRIES LOWER IN ITALY FOR 1948

Cherry production in Italy for 1948 is estimated at 104,000 tons, 9 percent below the 1947 production of 115,700 tons and 28 percent above the prewar (1935-39) average of 81,400 tons according to a report by Louis J. Reda, U. S. Foreign Service Clerk at Rome. Reduced production for the current season is attributed primarily to unusually heavy rains, and bad weather. The quality of the fruit is also inferior to last years' crop, many being water-soaked, broken and spotted.

CHERRIES: Utilization of the Italian crop
average 1936-38, annual 1946 and 1947

Year	Production	Waste	Exports		Consumption
			Fresh	Brined	
	Tons	Tons	Tons	Tons	Tons
Average					
1936-38	75,459	15,092	10,604	7,098	42,665
Annual					
1946	103,028	20,605	2,166	2,587	77,670
1947	115,656	23,131	9,324	6,245	76,956

WATERMELON PRODUCTION IN CUBA

Production of watermelons in Cuba, is estimated at around 4 million pounds annually, according to a report by Joseph L. Martinez, Research Assistant at Habana. Production is for domestic consumption in all areas, except in the Isle of Pines, which usually produces mostly for export to the United States. Watermelons produced in the Isle of Pines also are grown from United States seed, while those in other areas are from seed produced locally and known as "criollo".

Harvesting in the Isle of Pines extends from March through June, with the peak of the season in May; in Camaguey and Oriente Provinces, the season extends from July through October, and for the remainder of Cuba, only in July and August. Watermelons in the Isle of Pines weight from 12 to 35 pounds, and in other areas from 3 to 30 pounds.

WATERMELONS: Cuba's exports and imports,
average 1935-39, annual 1945-47

Year	Exports from Cuba to:			Imports into Cuba from:		
	U.S.	Other	Total	U.S.	Other	Total
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Average						
1935-39	304	0	304	61	8	69
Annual						
1945	98	0	98	70	14	84
1946	24	0	24	92	0	92
1947	175	0	175	102	0	102

Compiled from official trade of Cuba.

COTTON AND OTHER FIBER

FRENCH FLAX PRODUCTION INCREASED IN 1947

The French flax acreage for 1947 was estimated at 87,600 acres. It exceeded the 80,500 acres planted in 1946 but was less than the average of 93,600 acres per year during the decade of 1936 through 1945, according to a recent report from the U. S. Agricultural Attache at Paris. No estimate is available for 1948 at this time, but trade sources believe the acreage will be about equal to that of 1947.

A preliminary estimate of the 1947 crop in terms of scutched fiber was about 46,300,000 pounds compared with 52,300,000 pounds in 1946 and an annual average of 50,900,000 pounds from 1936 through 1945. The data for the years 1940-44 exclude three Departments which are included in figures for the other years, but very little flax is normally produced in these areas.

France: Flax area, production, and average yield,
1947 and comparisons

Flax	Unit	1938	1939	Average 1940-44 a/	1945	1946	1947 b/
Area	Acres	93,900	117,600	93,100	92,700	80,500	87,600
Average yield	Lbs./A.	559	671	518	468	650	529
Production c/	1,000 lbs.	52,500	79,000	47,800	43,400	52,300	46,300

a/ Excluded Bas-Rhin, Haut-Rhin and Moselle, but flax production is negligible in these Departments. Wartime data may include inaccurate estimates due to the difficulty in obtaining reliable data under the war conditions.

b/ Preliminary. c/ In terms of fiber which is about 12 percent of the straw.

Flax production in France has been less in the postwar period than during the war years in spite of the continued policy of the French Government to encourage a level of production which would make the country more nearly self-sufficient with respect to flax fiber. An area of close to 125,000 acres is believed to be sufficient in an average year to meet most of the requirements of the domestic flax spinning industry.

The smaller post-war acreages of flax in France compared with the large prewar and wartime averages are due mostly to the greatly reduced level of operations of the domestic spinning mills after the war. The reduced consumption of flax fiber by the mills resulted in an accumulation of stocks in the country and consequent difficulty to the growers in disposing of their crops at profitable prices. At present, however, the condition is reversed. Spinning mills have increased their production of yarn and are consuming more flax fiber so that now they are limited in their yarn output by insufficient supplies of fiber to keep operations at capacity.

Another difficulty in the way of increased flax production in France after the war resulted from the custom of shipping large quantities of French straw to Belgium for retting and scutching, then importing processed fiber in the form of either scutched or combed fiber and tow. (See table on opposite page.) The price of French straw, consequently, is directly influenced by the Belgian market price, since the French product must be sold to Belgian processors in competition with flax from other sources. The exchange rate for the French franc with other currencies in 1947 worked to the disadvantage of French flax growers. Acreage in 1947 might have been seriously reduced had the Government not taken steps early in the year

France: Flax production, trade, consumption, and stocks, 1938-47

Year	Domestic crop (fiber) a/	Exports of straw b/		Domestic production of fiber	Imports of fiber b/		Consumption of fiber	Exports of fiber	Ending stocks c/
		Belgium	Total		Belgium	Total			
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1938	52,491.5	211,881.9	212,653.5	17,636.8	56,001.2	85,547.3	74,074.6	7,775.6	d/
1939	78,986.4	137,961.7	138,896.4	d/	51,098.2	73,194.9	90,388.6	5,052.9	d/
1940 e/	42,965.4	169,207.5	169,335.3	d/	27,381.1	33,302.7	d/	1,715.2	d/
1941 e/	29,506.4	312,947.4	312,949.6	d/	38,834.0	41,902.8	d/	f/	15,119.1
1942 e/	47,535.6	92,602.0	92,602.0	23,267.3	21,159.8	24,387.3	55,972.6	f/	10,734.2
1943 e/	65,388.4	280,733.8	280,733.8	24,550.4	13,143.8	18,249.7	47,892.7	46.3	6,351.5
1944 e/	53,838.5	124,747.3	124,749.5	16,583.0	7,758.0	7,861.6	29,177.9	f/	3,196.7
1945	43,371.1	177,289.5	177,289.5	11,095.8	24,316.7	25,690.2	27,817.6	f/	10,639.4
1946	52,346.0	215,177.8	215,177.8	23,456.9	54,934.2	84,762.5	58,801.1	39.7	27,310.6
1947	46,320.9	199,904.3	199,906.5	21,638.1	50,950.5	76,579.0	58,816.5	877.4	26,228.1

a/ Expressed in terms of fiber; yield of fiber from straw is approximately 12 percent.
b/ Expressed in actual weight.
c/ In fiber processing plants and spinning mills only.
d/ No data available.
e/ Excludes Departments of Bas-Rhin, Haut-Rhin and Moselle. Data during the war years may include some inaccuracies due to the difficulty of obtaining reliable data under the wartime conditions.
f/ Negligible, if any.

Office of Foreign Agricultural Relations. Converted into equivalent weight in pounds from a table compiled by Service Central des Statistiques Industrielles from records of the Ministry of Agriculture, the Direction of Customs of the Ministry of Finance and Economic Affairs, and the Textile Union.

to assure a fair return to growers. The 1948 crop was not expected to be increased in response to the increased demand of domestic mills unless flax prices rose before the end of the planting season to a level favorable to producers. No estimate for the 1948 crop is available at this early date.

The Monnet Plan for French economic rehabilitation includes provisions for greater self-sufficiency with respect to flax. An area of between 120,000 and 125,000 acres was planned for 1950. In 1946 and 1947, however, actual acreages were considerably below the original plan of 93,900 and 98,800 acres, respectively.

The table of production, trade, consumption and stocks on page 125 does not represent a complete balance, but the table is useful for the general trends and relationships among the series of data. The crop estimates refer to the total crop, including that part which does not enter into commercial channels, but the domestic production of fiber shown is the commercial production only. The ending stocks indicated include only stocks held by fiber processors and fabric mills and exclude stocks held by dealers and those in transit.

Exports of flax from France are relatively small except for straw. (See table). Large quantities of straw are exported each year to Belgium for retting and scutching under agreements made between the industrial organizations of the two countries and recognized by the two Governments. Fiber is re-exported to France in an agreed proportion to the quantity of straw exported from that country to Belgium. The current proportion is 10 percent as flax and 6 percent as tow, or a total of fiber weighing 16 percent of the straw involved.

The price of flax straw of average quality from the 1947 French crop processed in France was fixed at 12 francs per kilo or the equivalent of about 4.58 cents per pound, including premiums. This price applies to straw yielding 12.5 percent flax and 6.25 percent tow. The price of straw exported to Belgium is not controlled. This straw is produced under a production contract which includes the price in the terms of the contract. The average price during the first half of the flax season was equivalent to only about 7 francs per kilo (2.67 cents per pound) and the French Government added a premium payment. After the devaluation of the French franc in January 1948 the price rose to approximately 12 francs per kilo (4.57 cents per pound) and the premium was discontinued.

(Continued on Page 132)

FATS AND OILS

CANADA DISCONTINUES FATS AND OIL SUBSIDY

Effective August 1, 1948, the Canadian Government discontinued the $2,000,000-a-month subsidy on fats and oils used in the manufacture of shortening and soap. Within a few days after these products were released from price control toilet soap advanced about 1 cent a bar, laundry soap from 1 to 2 cents a bar, and medium packages of flakes 3 cents a package.

Imports of fats and oils will continue on a quota basis as allocated by the International Emergency Food Committee, and in Canada distribution controls will continue to be handled by the Government.

DOMINICAN REPUBLIC PEANUT PRICE INCREASED

The Dominican Republic has increased the minimum price to growers for unshelled peanuts from $6.00 to $10.00 per 100 pounds. The action was taken because of a higher price paid by the State Oil Mill for peanuts imported for crushing. It is believed that the higher price will stimulate production of peanuts in the Dominican Republic.

U.S. EXPORTS OF SPECIFIED FATS, OILS, AND OILSEEDS

The following table shows United States exports of specified fats, oils and oilseeds during January-June 1948 with comparisons.

UNITED STATES: Exports of specified fats, oils, and oilseeds, January-June 1948 with comparisons

Commodity	Unit	Average 1935-39	1946	1947	January-June	
					1947	1948 a/
Soybeans	1,000 bu.	b/ 4,793	2,906	1,683	1,028	2,246
Soybean oil:						
Refined	" lbs.	c/ 6,647	72,583	38,450	19,052	25,896
Crude	" "		13,228	69,130	16,513	31,059
Coconut oil:						
Refined	" "	3,789	935	5,691	764	6,949
Crude	" "	10,442	47,366	52,849	33,922	7,058
Cottonseed oil:						
Refined	" "	4,793	5,857	10,942	2,420	19,840
Crude	" "	1,515	244	901	21	3,094
Linseed oil	" "	1,280	1,625	7,721	666	18,496
Peanuts:						
Shelled	" "	c/ 452	61,043	211,010	110,677	236,224
Not shelled	" "		7,066	18,681	14,015	4,341
Peanut oil, refined	" "	d/ 325	75	1,579	197	641
Cooking fats	" "	2,111	11,424	3,582	2,340	1,618
Lard	" "	165,636	430,682	354,184	175,790	147,015
Oleomargarine	" "	180	50,483	19,954	12,677	2,500
Tallow:						
Edible	" "	c/ 1,651	4,151	601	247	1,195
Inedible			6,472	55,051	18,952	19,966

a/ Preliminary.
b/ Average of less than 5 years.
c/ Not separately classified in Foreign Commerce and Navigation.
d/ 1939 only.

Compiled from official sources.

U. S. IMPORTS OF SPECIFIED VEGETABLE OILS AND OILSEEDS

The following table shows United States imports of specified vegetable oils and oilseeds, January-June 1948 with comparisons:

UNITED STATES: Imports a/ of specified oils and oilseeds, January-June 1948 with comparisons.

Commodity	Unit	Average 1935-39	1946	1947	January-June 1947	January-June 1948 b/
Babassu kernels	1000 lbs.	c/	39,463	22,233	21,032	30,625
Babassu oil	" "	d/ 346	2,314	1,747	1,036	1,224
Castor-beans	" "	132,924	226,295	276,807	139,794	153,145
Castor oil	" "	226	6,450	6,595	6,354	1,153
Flaxseed	" bu.	18,470	3,394	282	158	596
Linseed oil	" lbs.	713	94,405	117,326	106,545	3,015
Copra	Short tons	230,000	394,696	677,660	372,842	266,209
Coconut oil	1000 lbs.	342,717	2,353	23,559	14,891	45,688
Oiticica oil	" "	d/ 7,673	22,593	8,471	6,581	8,229
Olive oil:						
Edible	" "	62,811	12,660	11,250	4,626	18,106
Inedible	" "	35,448	103	248	199	7,350
Palm oil	" "	321,482	37,850	63,212	27,539	28,774
Sesame seed	" "	58,425	4,891	9,479	7,166	18,514
Tea seed oil	" "	13,159	88	6,377	5,516	2,572
Tucum kernels	" "	e/ 9,810	12,709	16,887	15,267	11,212
Tung oil	" "	123,190	36,207	121,564	76,968	62,019

a/ Imports for consumption. b/ Preliminary. c/ Not separately classified in Foreign Commerce and Navigation. d/ Average of less than 5 years. e/ 1939 only.

Compiled from official sources.

(Continued on Page 131)

LIVESTOCK AND ANIMAL PRODUCTS

NEW ZEALAND DAIRY OUTLOOK LESS PROMISING

On the first of August, the beginning of the new producing season in New Zealand, it seemed likely that the seasonal increase in dairy output would be less than normal for the month since pastures have been grazed closely during the winter. Prior to the winter just ending, conditions had been unsatisfactory for growth of pastures and feed reserves. Moisture conditions, though, are now good and pastures should respond readily to any rise in temperature during the next month or two. This outlook is reported by Meade T. Foster, the U. S. Agricultural Attache at Wellington.

Factory butterfat production for the August-June period, which represents the first 11 months of the marketing year just ended, totaled 355,912,231 pounds, as compared with 348,022,161 pounds for the corresponding period of the 1946-47 marketing year. This represents an increase of 7,890,070 pounds, or 2.37 percent. Conditions affecting the production of milk and butterfat since December have been disappointing to the industry. In the spring and early summer (August-November 1947) production got away to a good start, and had conditions remained normal it appeared that butterfat production would exceed that for the year 1946-47 by 10 percent. In December, however, drought conditions affecting grazing conditions, and in turn milk and butterfat production, developed in many parts of New Zealand. Consequently, except for February, production in each month since the first of the year has been smaller than during the corresponding month of the preceding year. In May and June factory butterfat production dropped to the lowest levels on record for those months, reflecting a shortage of winter grazing. Relief from the drought came so late in the fall that pastures did not have sufficient time to recover before winter set in, and reserve feeds also were in short supply. Because of these developments butterfat production for the year just beginning probably will exceed that for last year by only about 2 to 2.5 percent.

URUGUAYAN WOOL MARKET BRISK

Wool prices at Montevideo are the highest in history and good quality wool is finding a ready market, according to reports from the American Embassy there to the Office of Foreign Agricultural Relations. Even the lower grades of wool are reported moving at a good rate, and some producers are holding wool in anticipation of higher prices. Uruguayan wool is sold on the open market without any control by government officials.

The wool market has been firm for a number of months, and there has been much activity, with good quality wool moving about as fast as it has been brought in from the interior. Prices paid by exporters for super fine cross-breds range from 46 to 48 cents per pound, super cross-breds from 42 to 45 cents and average cross-breds 40 to 41 cents. Demand continues good for fine grades of Uruguayan wool which are generally shipped to the United States.

The outlook for the coming clip (1948-49) which begins officially on October 1 is good and it is expected that the output will equal or exceed the 70,000-ton estimate for the 1947-48 clip. During the past 40 days the weather has been cool and rainy which, according to many sheepmen, has favored good fleece development.

GRAINS, GRAIN PRODUCTS AND FEEDS

(Continued from Page 121)

BRAZIL REPORTS GOOD CORN CROP

Brazil's corn crop, now being harvested in parts of the country, will be about 220 million bushels, according to preliminary estimates submitted by Guy L. Bush, U. S. Agricultural Attache at Rio de Janeiro. This is slightly larger than the 1947 outturn of 213 million bushels and also a little above the average for recent years.

The favorable outlook is attributed in large part to the good outturn now being harvested in Rio Grande do Sul and the prospects for another good crop in northeast Brazil. The current crop in Rio Grande do Sul is estimated to be almost 55 million bushels, an increase of about 25 percent over last year's production. Most of the increase will be used in livestock feeding.

Present estimates indicate that the crop in central Brazil will be smaller than in 1947. Drought during the entire month of December in Sao Paulo and Parana reduced the outturn in those States. An increase forecast for Minas Gerais is expected to offset some of that loss, but the overall crop for central Brazil is expected to fall short of domestic needs for that area.

Corn exports from Brazil during 1948 are expected to total about 8 million bushels, slightly larger than the 1947 exports of 6.5 million bushels. Some corn may be available in Rio Grande do Sul, but the bulk of the shipment is expected to originate in the Northeast, as was the case in 1947. Though the production in that area is a small part of the country's total, unusually good outturns there last year gave supplies considerably above consumption needs. The short crop in central Brazil of course offers little prospect for exports.

Despite the favorable production outlook, there has been no relaxation of export controls. Considerable interest has been reported from countries that normally import corn, and there has been increasing pressure from producers and exporters for relaxing controls.

Wholesale prices advanced considerably during 1947 and the first half of 1948. Prices at the beginning of 1947 averaged about $1.38 per bushel and in May 1948 were $1.80 per bushel.

CANADA'S GRAIN PROSPECTS IMPROVE

Grain prospects in Canada's Prairie Provinces made further improvement during the last week of July and the first week of August, according to a recent report of the Dominion Bureau of Statistics. Near-normal temperatures and fairly well distributed rains had improved the outlook for late seeded crops, particularly, at the time of the report.

Prospects in Manitoba were almost uniformly excellent. Cutting and combining of spring grains was expected to be general in a few days. Harvesting of fall-sown grains was generally well advanced and completed in many southern districts of all three Prairie Provinces.

Yields in Saskatchewan and Alberta are expected to be extremely variable as a result of previous drought conditions and uneven germination. Spring crops were reported to be very late in Alberta, with harvesting not expected to be general for 1 to 3 weeks. Grasshoppers were still active in parts of Alberta and central and western Saskatchewan.

Recent rains in British Columbia improved the crop outlook in the Peace River and Central areas. Grain harvesting in southern areas is now general.

The harvest of fall grains in Ontario is virtually completed with above-average yields reported in almost all districts. About half of the spring grains were harvested at the time of the report and yields were described as generally excellent.

FATS AND OILS

(Continued from Page 128)

PALM KERNELS, PALM OIL, AND COPRA, FRENCH WEST AFRICA

Exports of palm kernels from the French West African Territories during 1947 totaled 44,114 short tons, according to a report from William Gennert, U. S. Vice-Consul, Dakar. The exportable surplus from the 1948 season is estimated 62,800 tons. The price of palm kernels by areas of origin, f.o.b. in bulk has been fixed at 16,920 CFA francs per metric ton ($121.72 per short ton) and 23.400 francs ($168.34). Prewar exports of palm kernels from these areas were about 100,000 short tons annually.

Exports of palm oil which averaged 30,300 short tons annually before the war are reported as 785 short tons in 1947, all from Dahomey. No estimate of shipments in 1948 is available. The price of palm oil in May was reported to range by grade from $256.18 per short ton for oil of type 5, more than 25 percent acidity, to $323.73 for type 1, 4 percent acidity. Controls regarding the sale of palm oil in French Guinea were removed in April, however, trade between factories and merchants must receive prior authorization and exports from Guinea must be approved by the governor.

Palm oil production is concentrated in Guinea, the Ivory Coast and Dahomey. The oil is used locally for cooking and for soap making. Most oil is extracted by primitive methods, and lack of transportation hinders movement. The annual yield fluctuates with moisture conditions but yields are believed to be decreasing, as the age of the bearing palms increase.

Copra and coconut oil are from palms growing primarily in the coastal region of Dahomey. The oil obtained is nearly all used locally for cooking oil or for soap. Exports of copra, reported as 743 short tons in 1945, dropped to only 132 in 1946 and increased to 629 tons in 1947. Exports in 1948 are not expected to exceed 1,000 tons. The price of copra is reported as $262.50 per short ton f.o.b.

A program to improve oil crops in the French Colonies is under direction of the "Institut de La Recherches pour les Huiles de Palm et Oleagineux", which includes four colonial experiment stations. The project aims to increase output by distribution of seeds of high yielding oil palms, by organizing plantations, and by increasing efficiency of extracting plants.

COTTON AND OTHER FIBER

(Continued from Page 126)

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the U. S. gulf-port average

Market location kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U. S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	8-12	99.05 lbs.	Tallari	59.00	49.23
Ashmouni, F.G.F.	"	"	"	53.00	44.22
Karnak, Good	"	"	"	92.00	76.76
Karnak, F.G.F.	"	"	"	(not	quoted)
Bombay		Candy			
Jarila, Fine	8-11	784 lbs.	Rupee	577.00	22.20
Broach, Fine	"	"	"	792.00	30.48
Kampala, East African	"	"	"	(not	available)
Karachi		Maund			
4F Punjab, S.G. Fine	8-12	82.28 lbs.	"	86.00	31.53
239F Sind, S.C., Fine	"	"	"	94.00	34.47
289F Punjab, S.G.,Fine	"	"	"	107.00	39.23
Buenos Aires		Metric tons			
Type B	"	2204.6 lbs.	Peso	1/ 3160.00	42.68
Lima		Sp. quintal			
Tanguis, Type 5	8-10	101.4 lbs.	Sol	1/ 235.00	35.65
Pima, Type 1	"	"	"	315.00	47.79
Recife		Arroba			
Mata, Type 4	8-12	33.07 lbs.	Cruzeiro	(not	available)
Sertao, Type 4	"	"	"	180.00	29.61
Sao Paulo					
Sao Paulo, Type 5	"	"	"	193.00	31.75
Torreon		Sp. quintal			
Middling, 15/16"	"	101.4 lbs.	Peso	172.50	2/
Houston-Galveston-New Orleans av. Mid. 15/16"	"	Pound	Cent	XXXXXX	31.27

Quotations of foreign markets reported by cable. U.S. quotations from designated spot markets.

1/ Nominal.

2/ Official exchange rate temporarily not available.

WORLD TOBACCO SUMMARY

(Continued from Page 116)

South America: Factors affecting plantings of tobacco in South American countries for harvest in the spring of 1949 indicate somewhat lower acreages than were harvested in the spring of 1948. Yields per acre for the 1947-48 crops, however, were generally below average and with normal yields, the 1948-49 output may equal the 1947-48 production. The trend to increased production of flue-cured leaf and light air-cured types suitable for export is expected to continue and the 1948-49 production of these types may exceed 1947-48 crops.

Combined 1948-49 production of tobacco in all of South America is forecast at 400 million pounds, which is the same as the revised estimate for the 1947-48 production and compares with the prewar, 1935-39, average of 305 million pounds.

Africa: The 1948 harvest of tobacco in Algeria and other North African producing countries is expected to exceed 1947 harvests. The crop in Algeria is forecast at 37 million pounds, as compared with a revised 1947 production of 31.5 million pounds. Harvests in the spring of 1948 in the South African producing countries were generally higher than that previously forecast and present indications are that plantings for 1948-49 crops will exceed 1947-48 plantings. With normal yields per acre harvests in the spring of 1949 may slightly exceed the output in the spring of 1948. In the case of Southern Rhodesia, the principal producing country in South Africa, growers have been assured of an export market for their flue-cured leaf through an agreement with United Kingdom manufacturers. Growers in other producing countries also have had some assurance of a satisfactory market for increased production.

The 1948-49 crop for all of Africa is forecast at 209 million pounds, as compared with 1947-48 crop of 203 million and the prewar average, 1935-39, production of only 125 million pounds.

Oceania: With normal yields, the 1948-49 production in New Zealand might total about 5 million pounds, and the production in Australia about 4.2 million. Yields per acre in Australia in 1947-48 were substantially below normal, and, as a result, the combined production of the Oceanic producing countries totaled 7.3 million pounds, as compared with the 1935-39 average of 6.7 million. The 1948-49 production is forecast at 9 million pounds.

This is one of a series of regularly scheduled reports on world agricultural production, approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, J. Barnard Gibbs, Constance H. Farnworth, and Mary L. E. Jones.